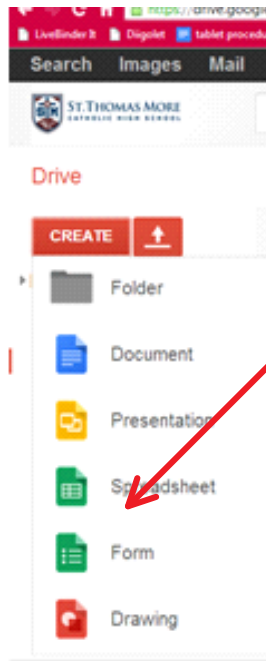


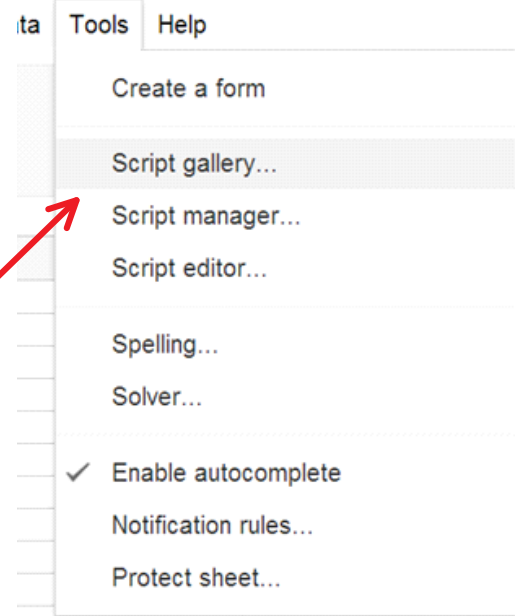
AutoCrat Script: Create a Mail Merge Letter with Google Form Data

<http://www.youpd.org/autocrat>

<http://www.youtube.com/watch?v=xeRhzz4RuCA>



In Google Drive, **CREATE** a **SPREADSHEET**.



From the menu, go to **TOOLS** - **SCRIPT GALLERY**.

Script Gallery

Public

Featured

Business

Type **AUTOCRAT** in the search bar.

Install **AUTOCRAT V4.3.2**

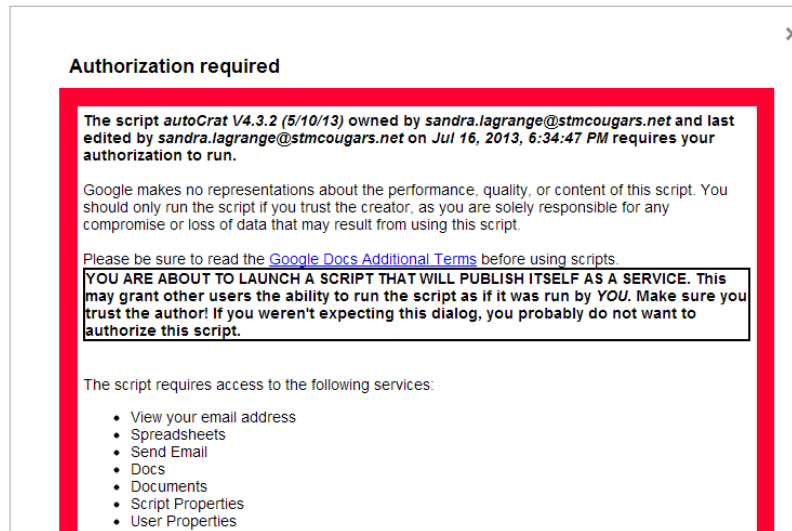


autoCrat V4.3.2 (5/10/13)

Flexible, easy to use document merge tool that enables conditional creation of PDF, Shared Doc and email file attachment from spreadsheet or form data.

astillman@gmail.com

[Help page](#)



When this box appears, the script has been installed.

Instructions for using the script will appear in the spreadsheet.

In order for the script to work, you will need to create a Google Document or Spreadsheet to use as a template for the merge.

First, create a template Document. Include double bracketed tags for any personalized data you want to populate from the spreadsheet. Ex) <<First Name>> . IMPORTANT: Do not use any non-alphanumeric characters in your tags. Other than that, it doesn't matter what you call the fields, because you will map them to your spreadsheet headers in a few steps. The benefit of spelling them the same as your data column headers: they will automatically map to the correct column in your source data.

If you've installed and authorized the script, you should see a new menu item to the right of "Help", called "Document Merge." If you don't see it, try running the onOpen function from the script editor (Tools->Script Editor->Run->onOpen).

In the "Document Merge" menu, select "Select data source and template doc" and complete the settings. If you don't have a collection that contains a template file with <<Merge tags>> in it, go back and do this first.

In Step 1: You will first be prompted to choose your merge template from Drive. A template must be Google Document type file, with <<Merge tags>> that you will use to match to your column headings.

In Step 2: you will be asked to choose which sheet contains your source data for the merge.

Step 3 will prompt you to "Set Merge Conditions," which means you have the option to require a match to a value in a particular field of your source data before a given row will be merged. Leaving this setting blank will cause it to be ignored.

Step 4, "Set Field Mappings", will ask you to map each <<Merge tag>> to the spreadsheet column you want to use to populate it. Save the mappings.

In Step 5, "Set Merge Type", decide what type of merge you want to try...there are a number of combos and cool possibilities. Look to the bottom of the panel for a clue as to the \$variableNames that are available for any of the fields you want to populate dynamically per row.

Here are some basic options to play with. Checkbox allows you to test on first-row only if you like.

* ONLY saving merged Docs to a collection, either as PDF or Doc format.

* Saving to a collection AND emailing PDF as attachment.

* Saving to a collection AND emailing recipient a link to individually shared Docs as View-only

* Saving to a collection AND emailing recipient a link to individually shared Doc as Editor

For date formatting to be handled in a merge field, you must use the Format->Number menu from the spreadsheet to format

any dates. Currently only three formats are supported: "M/d/yyyy", "MMMM d, yyyy", and "M/d/yyyy H:mm:ss" ... i.e. 1/30/2012...January 30, 2012, and 1/30/2012 9:32:34.

The document Header and Footer can also contain merge tags!

In Step 6, you can run the merge, test on only the first row, or simply save your settings for later.